

On-Line Grant Management System

USER GUIDE

for

Applicants

August 14, 2013

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Introduction:

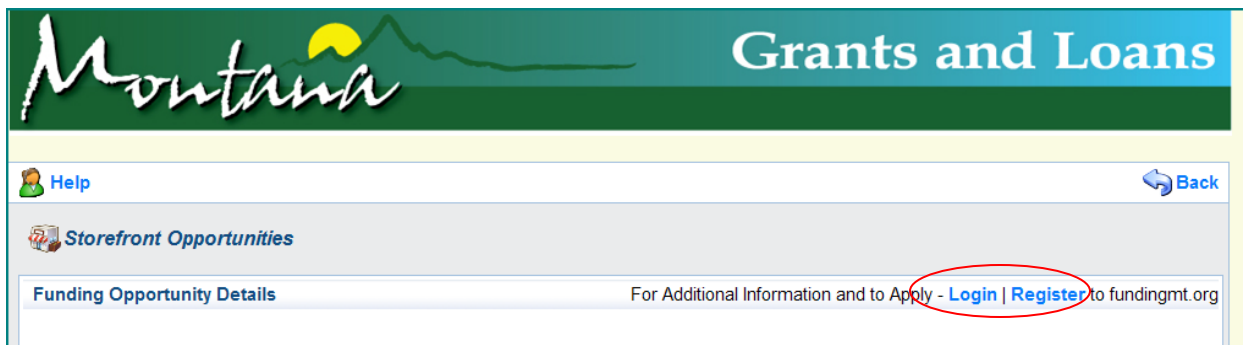
The Montana Department of Commerce – Big Sky Economic Development Trust Fund (BSTF) – Category II – Planning Projects, Primary Sector Workforce Training Grants (WTG) and the Montana Community Development Block Grant – Economic Development (CDBG-ED) Planning Projects will be accepting applications through the State of Montana Grants and Loan on-line system.

WebGrants Registration Instructions

[Read ALL instructions before registering!](#)

Go to the following website <https://fundingmt.org> to register yourself and the organization you work for, click on “Register Here”. If there are multiple people working for the same organization that is applying for the Department of Commerce – Business Resource Division’s (BRD) program, **only** enter the primary contact person for that organization. Additional people can be added to the organization after the primary contact person gets the login information from the WebGrants system.

The screenshot displays the Montana Grants and Loans website. At the top, there is a green header with the word "Montana" in a stylized font and a yellow sun icon, followed by the text "Grants and Loans" in white. Below the header, there is a yellow banner with the text "System Compatibility" in blue. The main content area is divided into two columns. The left column contains a "Login" section with fields for "User ID:" and "Password:", a "Login" button, and a "Forgot Password?" link. The right column contains the "mt.gov" logo, the text "Montana's Official State Website", and a section titled "New to WebGrants - State of Montana?" with a "Register Here" link circled in red. Below this, there is a section titled "Funding Opportunities Offered by Montana State Agencies" with a "Search Here" link. At the bottom, there is an "Announcements" section with the same "Funding Opportunities Offered by Montana State Agencies" and "Search Here" link, and a note stating "You do not need to register for Search access."



- Complete the required information on the form and then click on “Register” at the top or bottom of the form. The titles with a red astrisk by them indicate the field is required.

Register

Personal Information

Name:*

Mr.

SalutationFirst NameMiddle NameLast Name

Email:*

Address:*

Montana

CityState/ProvincePostal Code/Zip

Phone:*

Ext.

Fax:*

Ext.

What Agency's Grant Programs are you most interested in?:

Department of Agriculture

Organization Information

Name:*

Organization Type:

City Government

Organization Website:

Address:*

Montana

CityState/ProvincePostal Code/Zip

Phone:*

Ext.

Fax:*

Ext.

Do not enter dashes in the phone & fax numbers.

Click on the little down arrow and select “Department of Commerce”.

Do not enter dashes in the phone & fax numbers.

Register

- Continue completing the Organization Information then click on “Register” to submit your registration. The Department must approve your registration before WebGrants will send you your User ID and password. This process may take several business days to receive your login information, so please be patient.

To add people to your organization

- Select the organization name under “Associated Organizations” to add people to your organization who have not registered under the Webgrants system before.

[Menu](#) | [Help](#) | [Log Out](#)
[Back](#) | [Print](#) | [Add](#) | [Delete](#) | [Edit](#) | [Save](#)

My Profile

My Profile
[My Alerts](#) | [Reset Password](#)

Name: * Ms. John Doe
Salutation First Name Middle Name Last Name

Title:

Email: lhuff@mt.gov

Address: 302 N Roberts
 2nd Floor
 Room 215
 * Helena Montana 59620
City State/Province Postal Code/Zip

Phone: * 406-444-9582
Phone Ext.

Fax: 406-444-5409
Ext.

Last Edited By: Zach Owen

Associated Organizations

| Name | Type | Website | Phone | City | State |
|-----------------------------|---------------------------------|--|--------------|-------------|----------|
| <u>Grantee Organization</u> | Out of State For-Profit Company | www.grantor.org | 456-538-8700 | Stonesville | Virginia |
| DNR-Tutor | State Government | | 406-444-9766 | Helena | Montana |

- Then select “add” under Registered User to create a user in WebGrants for your organization.

Menu | Help | Log Out Back | Print | Add | Delete | Edit | Save

My Profile

Grantee Organization

Organization Information

Name: Grantee Organization

Organization Type: Out of State For-Profit Company

Organization Website: www.grantororg.com

Address: 578 Main st.
1st Floor

* Stonesville Virginia 84111
City State/Province Postal Code/Zip

Phone: 456-538-8700
--- --- ----

Ext. Ext.

Fax: 801-538-8888
--- --- ----

Last Edited By: System Administrator, 10/26/2008

Registered Users

| Name | Email | Phone | City | State | Remove |
|----------------|----------------|--------------|--------|---------|------------------------|
| John Doe | lhuff@mt.gov | 406-444-9562 | Helena | Montana | Remove |
| A grTest | jdayton@mt.gov | 406-444-9562 | Helena | Montana | Remove |
| Sunshine Moohn | lhuff@mt.gov | 406-554-5135 | Helena | Montana | Remove |

- Complete the form with the contact information for the person you are adding and click on "Save".

Menu | Help | Log Out Back | Print | Add | Delete | Edit | Save

My Profile

My Profile

Name: * Mr. First Name Middle Name Last Name

Title:

Email: * email

Address: * address

* city Montana zip code

City State/Province Postal Code/Zip

Phone: * phone do not use hyphens

Phone Ext.

Fax:

--- --- ----

- You can view your organization information and see that you and the new registered user are now associated with the organization.

The screenshot shows the 'Montana Grants and Loans' web application. The top navigation bar includes links for Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save. The main content area is titled 'My Profile' and displays 'Grantee Organization' information. The organization details include Name, Organization Type, Website, Address, City, State, Postal Code, Phone, Ext., and Fax. Below this, a 'Registered Users' table lists users with columns for Name, Email, Phone, City, State, and a Remove button. The footer indicates the last edit by a System Administrator on 10/28/2008.

| Grantee Organization | | | | | | |
|--|---------------------------------|----------------|-----------------|---------|--------|--|
| Organization Information | | | | | | |
| Name: | Grantee Organization | | | | | |
| Organization Type: | Out of State For-Profit Company | | | | | |
| Organization Website: | www.grantororg.com | | | | | |
| Address: | 578 Main st. 1st Floor | | | | | |
| | * Stonesville | Virginia | 84111 | | | |
| | City | State/Province | Postal Code/Zip | | | |
| Phone: | 456-538-8700 ***-***-**** | | | | | |
| Ext. | Ext. | | | | | |
| Fax: | 801-538-8888 ***-***-**** | | | | | |
| Last Edited By: System Administrator, 10/28/2008 | | | | | | |
| Registered Users | | | | | | |
| Name | Email | Phone | City | State | Remove | |
| Sue Anderson | ivoipe@mt.gov | 406-444-9898 | bozeman | Montana | Remove | |
| John Doe | lhuff@mt.gov | 406-444-9562 | Helena | Montana | Remove | |
| AgriTest | jdayton@mt.gov | 406-444-9562 | Helena | Montana | Remove | |

CAUTION: Only the primary contact for the organization should be adding and removing people from the organization.

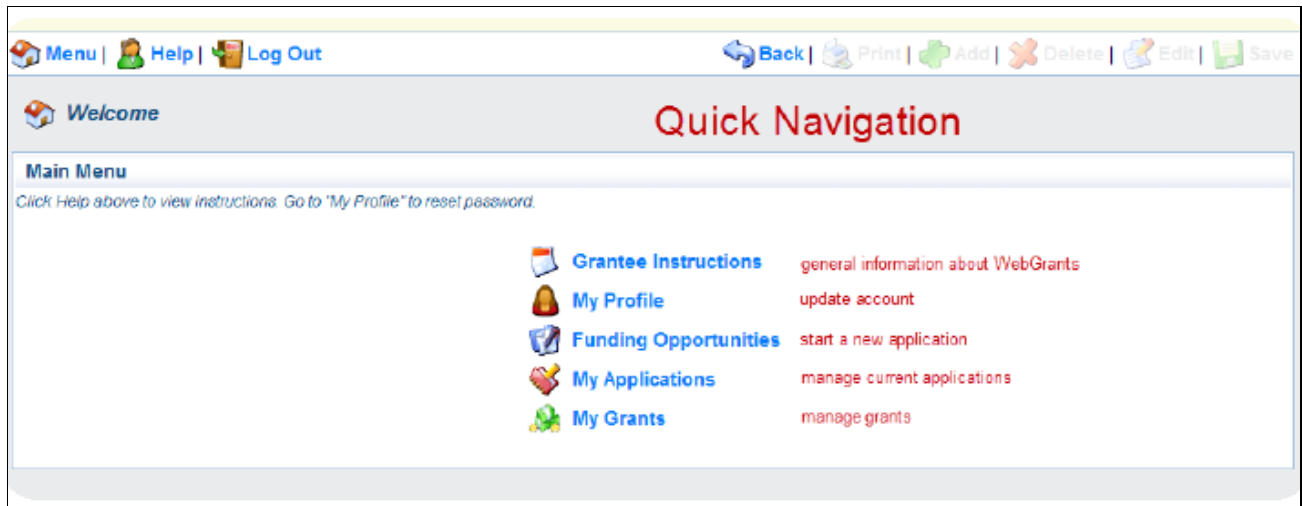
This feature allows the primary contact to add people to the WebGrants database, however when you select "Remove" this removes the person from the organization not the WebGrants database. Once you added a person to your organization, he or she will get an email from WebGrants giving them their User ID and Password. **BE AWARE, if you add a person you previously removed, you are creating a duplicate record in WebGrants database.** Please contact the Department of Commerce to re-associate a person that you removed from your organization.

If you are already entered into the system, you do not have to re-register. If you are already registered and want to be associated with another organization, then the primary contact person for the organization should email sleferink@mt.gov authorizing the person to be granted access to the application

Please contact Sue Leferink, Computer Support Specialist, at 406-841-2721 if you have any questions or problems with registration process. Thank you!

Log-on to the Webgrants system

- Once registered in the system, then enter the User ID and Password as assigned by the system.
- The Main Menu looks like:



- The main menu is the first page of the application when you log in. The main menu will take you to the modules of the application. Each module is explained below:

Instructions:

This link displays a high-level instructions page describing all the screens in the application.

Funding Opportunities:

This link displays all currently posted opportunities, you may create and submit an application for each opportunity.

My Applications:

All previously created applications can be found in this module.

My Grants:

All grants can be found here, you can also create status reports, request claims and communication with the grantor in this module.

My Profile:

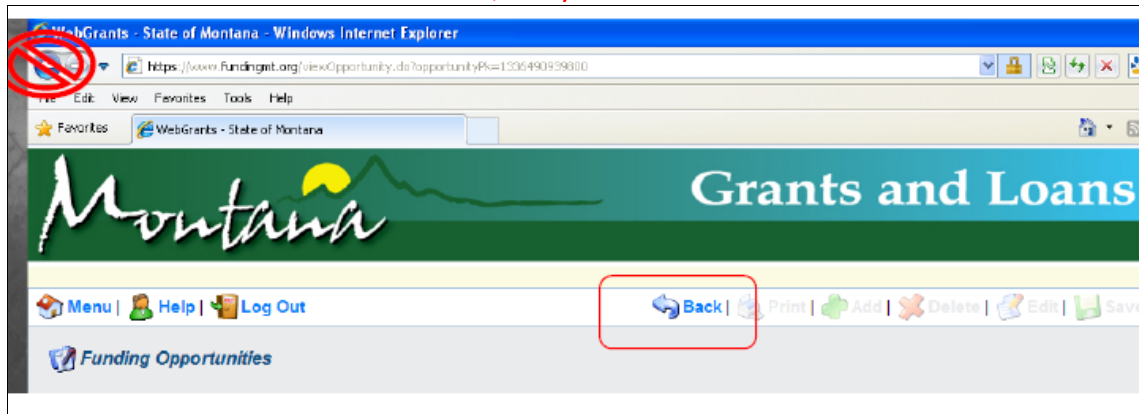
You can update your contact information in this module.

Couple basics:

- Any text in the database highlighted with blue is a link. This is what you click on.

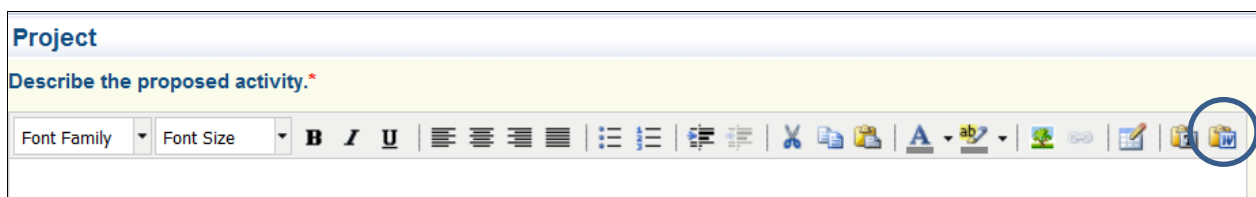
Back Arrow

- Use the database Back button, *not* your internet browser back arrow.

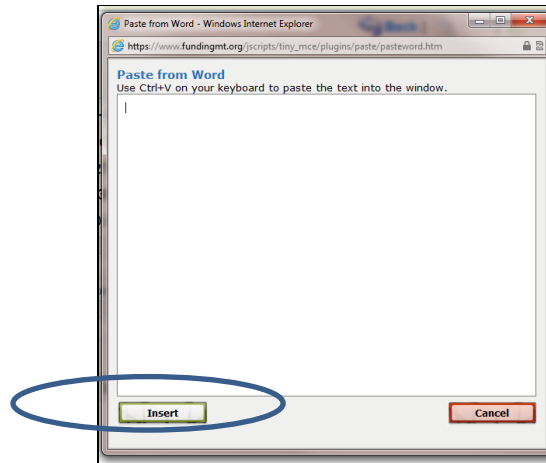


Cutting and Pasting from Microsoft WORD

- The system does not have a spell checker. You are welcome to prepare the narrative information in Word. If using Word, it is a two-step process to insert the data.
 - Copy the word data.
 - Paste the information into the application using the Word button (clipboard with Word icon).



- A dialogue box will open. Copy the data to the dialogue box and hit insert.



Funding Opportunities

To find the program to which you would like to submit an application, select the Funding Opportunity from the Main Menu.

- The Current Funding Opportunities will provide a detail list of all the grants currently available through the on-line application process.
- The BSTF Cat II, WTG and CDBG-ED Planning Projects can be found at Department of Commerce.

Applications

- Once you selected a Funding Opportunity, you can review the Opportunity Details about the grant. There is also a link to the complete paper application in pdf form at the bottom of the page.
- Applicants can either start a new application or copy an existing application.

| Funding Opportunities | | |
|--|-------------------|---------|
| Current Applications | | |
| Any previously created applications, for this opportunity, appear below. To start a new application for this opportunity, Click the Start a New Application link or to copy data from an old application, click on the Copy Existing Application link. | | |
| ID | Application Title | Status |
| 10289 | TEST | Editing |
| Opportunity Details | | |
| 10275-DOC - Test - BRD - BSTF - FY13 | | |
| Copy Existing Application Start a New Application | | |

General Information

- In this section, the applicant would add the Project Title (which will carry through-out the application)
- When the applicant registers, there is an opportunity for multiple people to be associated with this organization. This is where you could change who are the primary contact and/or organization. However, they must be registered and associated with this organization.
- Once you enter the information, then click save on the menu ribbon.

The screenshot shows a web application interface with a menu ribbon at the top containing 'Menu', 'Help', 'Log Out', 'Back', 'Print', 'Add', 'Delete', 'Edit', and 'Save'. The 'Save' button is circled in blue. Below the menu is an 'Instructions' section with the following text:

Instructions

Fill out the form below and click "Save". Once completed and saved, click on the "Go to Application Forms" link to continue completing the rest of the application. Pick the appropriate Primary, Additional and Authorized Officials. If additional contacts or authorized officials have not been registered in the system, request that the primary contact person add them to the organization. Enter a BRIEF project title, you will have the opportunity to detail your project further in the application.

To save or edit this form, click "Save" or "Edit" in the upper right hand corner of the screen. Information entered into this form will be lost unless the "Save" icon is selected before moving on to the next form. If you wish to move back a screen, select the "Back" icon. Do not click on the main browser's back arrow. Doing so could unknowingly jeopardize the integrity of the data entered into the application thereby interfering with your application submittal.

The Primary Contact is the individual in your organization who will be designated as the primary person responsible for this application from your organization. This individual will receive automated email notifications when your attention is needed on this application.

The Authorized Official, if this is displayed, is the person from your organization who is authorized to submit the proposal and commit your organization to the work involved. Select the organization, if you belong to more than one, for which you will be submitting this application.

General Information

Primary Contact:* BRD1 Tester ▼

Project Title: (limited to 250 characters)* TEST - Project A - 04/10/13

Authorized Official:* BRD1 Tester ▼

Organization:* Test Applicant - Commerce BRD Organization1 ▼

- The next screen summarizes the information that was submitted.
- The applicant can edit the information by clicking edit on the menu ribbon.
- The applicant is ready to start completing the program specific forms by clicking on the Go to Application Forms

| | | | | | | | | |
|------|------|---------|------|-------|-----|--------|---------------|------|
| Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save |
|------|------|---------|------|-------|-----|--------|---------------|------|

Application

Application: 10294 - TEST - Project A - 04/10/13

Program Area: DOC - Test Area
Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13
Proposal Deadline: 06/30/2013

Instructions

Fill out the form below and click "Save". Once completed and saved, click on the "Go to Application Forms" link to continue completing the rest of the application. Pick the appropriate Primary, Additional and Authorized Officials. If additional contacts or authorized officials have not been registered in the system, request that the primary contact person add them to the organization. Enter a BRIEF project title, you will have the opportunity to detail your project further in the application.

To save or edit this form, click "Save" or "Edit" in the upper right hand corner of the screen. Information entered into this form will be lost unless the "Save" icon is selected before moving on to the next form. If you wish to move back a screen, select the "Back" icon. Do not click on the main browser's back arrow. Doing so could unknowingly jeopardize the integrity of the data entered into the application thereby interfering with your application submittal.


General Information

System ID: 10294
Project Title: TEST - Project A - 04/10/13
Primary Contact: BRD1 Tester
Additional Contacts: BRD1 Tester
Organization: Test Applicant - Commerce BRD Organization1

[Go to Application Forms](#)

Forms

- The application forms are all the sections of the application. You'll need to go into each one individually, enter the required information (*).
- The applicant must complete each form before he is able to submit the application.

 **Application**

Application: 10289 - TEST

Program Area: DOC - Test Area

Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13

Proposal Deadline: 06/30/2013

Requested Total: \$52,500.00




Instructions







Once you are done with all sections of your application and they have all been marked complete, click **"Submit"** to submit your application.


Application Forms
App

| Form Name | Complete? |
|------------------------------------|-----------|
| General Information | ✓ |
| BSTF Applicant Information-FY14 | ✓ |
| BSTF Project-FY14 | ✓ |
| BSTF Project Source and Uses SFY14 | ✓ |
| Supporting Documentation | ✓ |
| Certification | ✓ |

- By clicking on the Form Name, then the form will open. (Note, the grantee can modify any of the information until the application has been submitted).
- To enter data, click on Edit on the menu ribbon.

 Menu |
  Help |
  Log Out

 Back |
  Print |
  Add |
  Delete |
  Edit |
  Save

 **Application**

Application: 10440 - TEST - Annmarie - 04/18/13

Program Area: DOC - Test Area

Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13

Proposal Deadline: 06/30/2013

Requested Total: \$10,500.00

Instructions

Please provide detailed answers to the following sections, which will help us understand your project and will clearly identify the use of the BSTF funds.

Project
Mark as Complete | Go to Application Forms

Describe the proposed activity.*

Describe the assisted entity or business (if applicable).

List the activities that involves the utilization of the BSTF funds.*

- Each of the fields will open up.

- Enter the information.
- Once you have completed the required forms, then click save on the ribbon.

The screenshot shows a web application interface for an 'Application' form. At the top, there is a navigation bar with links: Menu, Help, Log Out, Back, Print, Add, Delete, Edit, and Save. The 'Save' button is circled in blue. Below the navigation bar, the form title is 'Application'. The main content area displays application details for 'Application: 10289 - TEST'. The details include: Program Area: DOC - Test Area, Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13, Proposal Deadline: 06/30/2013, and Requested Total: \$52,500.00. Below this, there is an 'Instructions' section with the text: 'This is instructions for the entire form you are asking an applicant to fill in.' The next section is 'Eligible Applicant Information' with the instruction: 'Provide information about the eligible applicant'. Under this, there is a 'Program Eligibility' section with the text: 'Eligible applicants are CRDC, Tribal Governments along EDO, which are located in a county that is not part of a CRDC region and meet program eligibility requirements. Are you an eligible applicant? *'. There are two radio buttons: 'Yes' and 'No'.

- Once you save, you need to Mark as Complete.

The screenshot shows the same 'Application' form as before, but now the 'Mark as Complete' button is circled in blue. The application details are the same: 'Application: 10314 - TEST - BSTF - 04-12-13', Program Area: DOC - Test Area, Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13, and Proposal Deadline: 06/30/2013. The 'Instructions' and 'Eligible Applicant Information' sections are also present. The 'Mark as Complete' button is located at the bottom right of the form, next to the 'Go to Application Forms' link.

- Once all the forms have been completed, then the applicant would hit submit. Once they hit submit, they cannot change the information.

Special Form Instructions

Budget Form

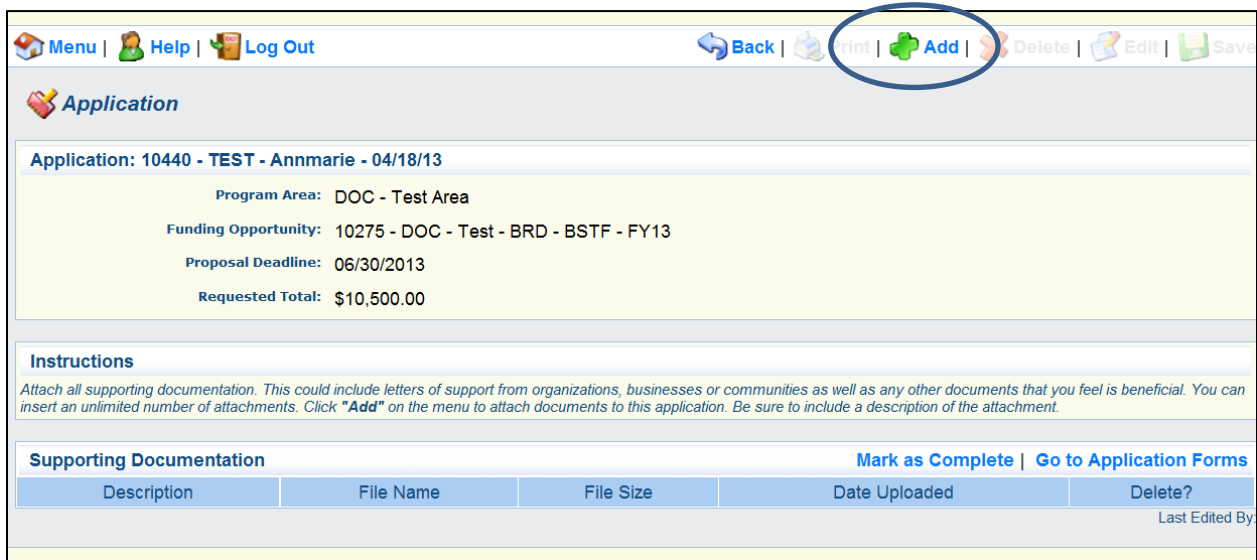
- To create the budget, you will first need to click Add.
- The overall project budget should be based on the deliverables. With the budget for that deliverable split between the funding agencies and other funding sources.

- Enter the required information and Save. Do this for as many deliverables as you are proposing. Just keep clicking the Add button and saving the information.
- If you are requesting administration funds, **Administration** should be listed as the deliverable.

Attachments

---Supporting Documentation form

- At the Supporting Documentation screen, click **Add** on the menu to attach documents to this application



Menu | Help | Log Out | Back | Print | **Add** | Delete | Edit | Save

Application

Application: 10440 - TEST - Annmarie - 04/18/13

Program Area: DOC - Test Area

Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13

Proposal Deadline: 06/30/2013

Requested Total: \$10,500.00

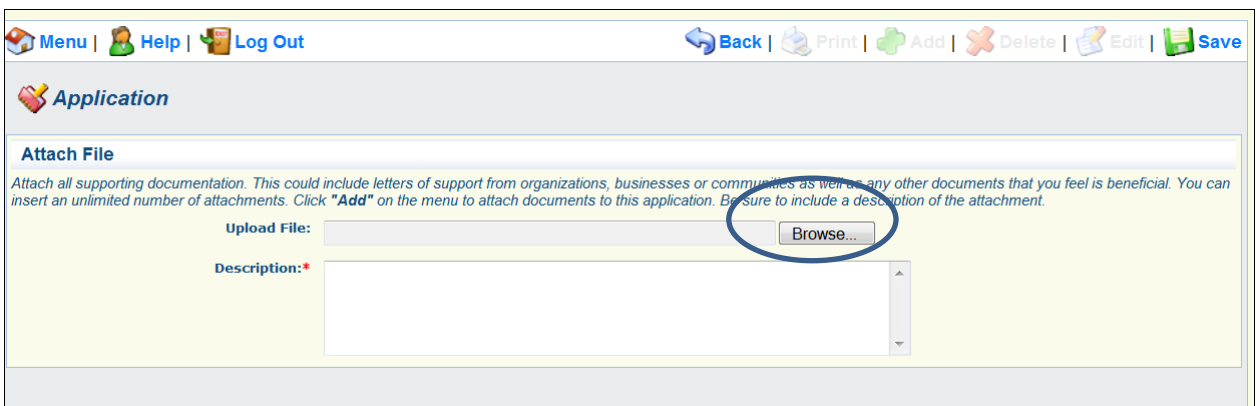
Instructions

Attach all supporting documentation. This could include letters of support from organizations, businesses or communities as well as any other documents that you feel is beneficial. You can insert an unlimited number of attachments. Click "Add" on the menu to attach documents to this application. Be sure to include a description of the attachment.

Supporting Documentation [Mark as Complete](#) | [Go to Application Forms](#)

| Description | File Name | File Size | Date Uploaded | Delete? |
|-----------------|-----------|-----------|---------------|---------|
| Last Edited By: | | | | |

- Next, click on browse to find the file on your computer



Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

Application

Attach File

Attach all supporting documentation. This could include letters of support from organizations, businesses or communities as well as any other documents that you feel is beneficial. You can insert an unlimited number of attachments. Click "Add" on the menu to attach documents to this application. Be sure to include a description of the attachment.

Upload File: **Browse...**

Description:*

- Double click on the file that you want.
- You are required to add an description of the file.
- Once, this is complete, then click on the **Save** button on the ribbon

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | **Save**

Application

Attach File

Attach all supporting documentation. This could include letters of support from organizations, businesses or communities as well as any other documents that you feel is beneficial. You can insert an unlimited number of attachments. Click "Add" on the menu to attach documents to this application. Be sure to include a description of the attachment.

Upload File: Browse...

Description: *

- You will return to the first screen. At this point you can add additional documents or **Mark As Complete**.

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

Application

Application: 10440 - TEST - Annmarie - 04/18/13

Program Area: DOC - Test Area

Funding Opportunity: 10275 - DOC - Test - BRD - BSTF - FY13

Proposal Deadline: 06/30/2013

Requested Total: \$10,500.00

Instructions

Attach all supporting documentation. This could include letters of support from organizations, businesses or communities as well as any other documents that you feel is beneficial. You can insert an unlimited number of attachments. Click "Add" on the menu to attach documents to this application. Be sure to include a description of the attachment.

Supporting Documentation

Mark as Complete | [Go to Application Forms](#)

| Description | File Name | File Size | Date Uploaded | Delete? |
|-------------|---|-----------|---------------|---------|
| Test. | This is a test page for the applicaton.docx | 13 KB | 06/18/2013 | |

Last Edited By: BRD1 Tester, 06/18/2013

- Once you selected, Mark as Complete, then you will return to the application forms screen.

-- Attachments (Inserting a document within a form)

- On several forms (Certification and Budget Narrative), you are asked to insert attachments. However, when you click Edit, then the icon to insert attachment disappears.
- After you have added the required information on the form, then click on save.
- Then the icon will appear to attach the documents.

Budget Attachments

Before you can insert the attachments, please click on save; then the icon will appear to attach the documents. Multiply documents can be attached is a single PDF. If you need to attach additional documentation, please add those documents to the Supporting Documents section.

Cost Estimates or Quotes

Please attach the cost estimates and/or quotes for any professional services or vendors to be utilized.

Cost Estimates

Cost Estimates

Letters of Commitment

Please attach any letters of commitment for the other funding sources.

Letters

Letters

Last Edited By:

- Click on the **icon** to add a file
- The next screen will allow you to upload the file by clicking on **Browse**. Then, browse your computer for the file.

WebGrants - State of Montana - Windows Internet Explorer

https://www.fundingmt.org/addComponentEntityAttachment.do?pk=1367956380662&fd=ApplicationDoctestBudgetattachments2_BudgetAtt

Attach File

Upload File:

Browse...

Attach File

Last Edited By:

- Once you have found the file on your computer, double click on the file and click **Attach File**.